MintTrack User Manual

**Getting Started** – Thank you for choosing MintTrack for your Android Mobile device. Please read the following documentation to make the most of your experience with the application.

* **Text fields** are used to enter information such as transaction amounts and transaction notes in the Entry tab, Account name and balance in the Account Manager, Category name and balance in the Category Manager, and information in the Tip Calculator. When you select a text field, an on-screen keyboard will load. Please use only valid input for currency values in order to ensure correct application behavior.
* **Dropdown boxes**, or spinners as they’re called in the Android OS, are used to select accounts and categories in the Entry tab. When selected, a new screen appears with a list of elements featured in the spinner. The item you select will now appear as the main item of the spinner, viewable from the tab layout.
* **Auto-updating fields** are used to display information only and cannot be changed by the user. The Home tab uses auto-updating fields. On some occasions, such as in the Account and Category managers and when editing a transaction, text fields will be auto-updating depending on your actions (i.e. If you choose an account in the Account Manager, the account type and balance will be automatically added to the text fields on the screen, and may be changed.)
* **Date pickers** are used to choose dates to record for transactions in the Entry tab and to customize queries in the Audit tab. When a date picker is selected, a new screen will appear. You may either press the up and down buttons above and below each field to change the date, or select the fields themselves and type it; your choice.
* **Options Menus** can be found on every tab by pressing the menu button on your mobile device. There are two buttons on every options menu. One is for help with the current tab you are on, the other is information about the application.

Now you have a basic understanding of the elements used in this application. Please continue to read through the user manual to better understand the application’s functionality.

**Using the Home Tab**

****The Home tab is used as a summary screen for your totals and recent transactions. As you enter transactions into the application, the Home tab will be updated and keep track of your income total, expense total, and grand total so you know exactly how much money you have spent and received at any given time. Additionally, the Home tab displays your four most recent transactions at the bottom of the screen. There is no user interaction required to use this feature.

**Using the Entry Tab**

The Entry tab is where you will enter your transaction information. There are three types of transactions you can record: income, expense, and transfer.

* **Enter an Income Transaction** – By default, income transaction is selected as the transaction type the first time you access the Entry tab. An income transaction consists of five parts: amount, date, account to put money into, income category, and transaction note. In order to submit an income transaction to the database, make sure all fields are filled correctly and press the save button at the bottom of the screen. You may change data in the transaction later using the Audit tab’s edit feature.
* **Enter an Expense Transaction** - An expense transaction consists of five parts: amount, date, account to take money from, expense category, and transaction note. In order to submit an expense transaction to the database, make sure all fields are filled correctly and press the save button at the bottom of the screen. You may change data in the transaction later using the Audit tab’s edit feature.
* **Enter a Transfer Transaction** – A transfer transaction consists of five parts: amount, date, account to put money into, account to take money from, and transaction note. In order to submit a transfer transaction to the database, make sure all fields are filled correctly and press the save button at the bottom of the screen. You may change data in the transaction later using the Audit tab’s edit feature. Please note that transfer transactions do not count towards your income or expense totals on the Home tab, they are used to move money between accounts.

If the form is cleared after you press the save button, you will know that your transaction data has been saved and will be available through querying the database in the Audit tab.

**Audit Tab**

The Audit tab is very useful for viewing a list of past transactions. When you access the Audit tab for the first time, there will be no transactions listed.

* **Query a Date Range** - After you enter a transaction, you must choose a date range on the Audit tab in order to view that transaction’s data if you wish to do so. If a date range is not selected, the current day will be used as the search criteria. After you select a date range with the date pickers, press the query button to display the results. If there are no results, the screen will not change. If transaction data is too large for the screen, simply slide your finger along the screen to scroll through it.
* **Edit a Transaction** – After querying your saved data, you may click on a transaction’s data in the list and choose to edit it. When the edit button is pressed, the entry screen loads with the selected transaction’s data. By changing the data and pressing the save button, you update that transaction’s information in the database and totals on the Home tab are updated as needed.
* **Delete a Transaction** – After querying your saved data, you may click on a transaction’s data in the list and choose to delete it. When the delete button is pressed, the transaction data disappears from view and is removed from the database and the totals on the Home tab are updated as needed.

**Tools Tab**

The tools tab is where the customization and extraneous features are found. You can navigate to this tab in order to view account information, category information, or use the built in tip calculator.

* **Account Manager** will help keep your accounts in order and let you personalize them to better suit your financial organization needs. Accounts can be added or changed at any time.
  + **Add a New Account** – In the account manager, press the “Add New” button and you will see text fields appear for a new Account Name and Account Balance. You will also notice a checkbox labeled “Active?” Please do not leave the Account Name field blank when creating a new account. If you leave the balance field blank, the balance for the account will default to $0.00. If the Active checkbox is checked, the account will be Active, so you will be able to select it in the Entry tab. If the Activity checkbox is unchecked, the Account will be disabled until you re-enable it. Press the Save button to save your new account to the database.
  + **Edit an Existing Account** – In the account manager, press the “Edit Existing” button and you will see multiple items appear on the screen. The first is a dropdown box that you will use to select the account you would like to edit. After selecting an account, that account’s information will appear in the name and balance text fields, as well as the account’s current state of activity (active/disabled). You may edit any of the aforementioned fields. Press the save button to save your changes and update the account’s information.
* **Category Manager** will allow you to keep your personal categories of expenditures and income under your control. Add as many as you’d like. Categories can be added or changed at any time.
  + **Add a New Category** - In the category manager, press the “Add New” button and you will see text fields appear for a new Category Name and Category Balance. You will also notice a checkbox labeled “Active?” Please do not leave the Category Name field blank when creating a new account. If you leave the balance field blank, the balance for the category will default to $0.00. If the Active checkbox is checked, the category will be Active, so you will be able to select it in the Entry tab. If the Activity checkbox is unchecked, the category will be disabled until you re-enable it. Press the Save button to save your new category to the database.
  + **Edit an Existing Category** – In the category manager, press the “Edit Existing” button and you will see multiple items appear on the screen. The first is a dropdown box that you will use to select the category you would like to edit. After selecting a category, that category’s information will appear in the name and balance text fields, as well as the category’s current state of activity (active/disabled). You may edit any of the aforementioned fields. Press the save button to save your changes and update the category’s information.
* **Tip Calculator** is a nice, simple program to aid you in divvying up the check when you’re out to eat with your friends and family. Simply enter in the amount of the check as a dollar value, the percentage of tip you wish to leave as a *whole number* (no decimals needed!), and the amount of people in your group. When you press the “Calculate…” button, you will receive the total amount of the check with the tip included and the amount each person should pay.

Congratulations! You now have all the information you need in order to quickly and efficiently use the MintTrack application. Enjoy!